

UNCOVERING WHAT ENABLES AND CONSTRAINS 'OPEN PRACTICES' IN THE GLOBAL SOUTH: REFLECTIONS FROM THE ROER4D PROJECT. KEYNOTE PRESENTATION AT THE 2ND INTERNATIONAL CONFERENCE OF THE AFRICAN VIRTUAL UNIVERSITY, NAIROBI, KENYA, 1-3 JULY 2015

Hodgkinson-Williams, C;

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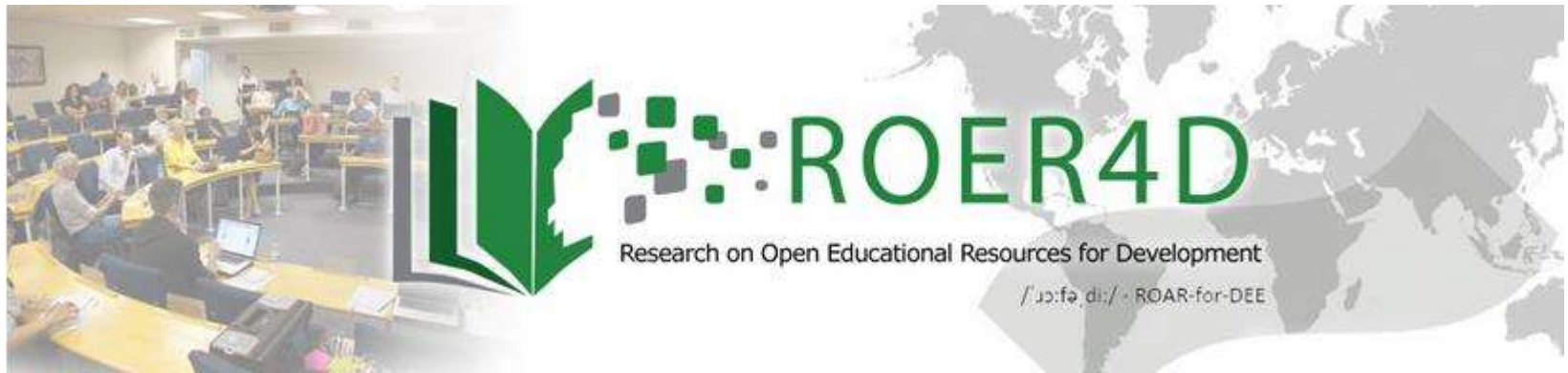
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IDRC Grant/ Subvention du CRDI: 107311-001-Research into Open Educational Resources for Development



Keynote presentation
Uncovering what enables and constrains 'open practices' in the Global South: Reflections from the ROER4D Project

Cheryl Hodgkinson-Williams


University of Cape Town

2nd International Conference of the African Virtual University

Nairobi, Kenya

1-3 July 2015

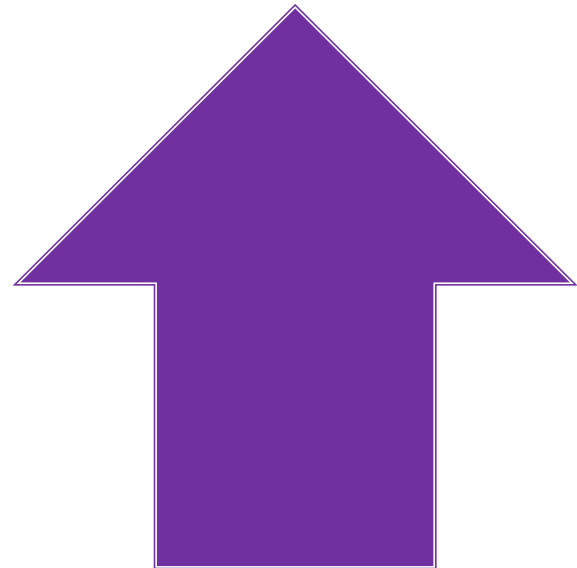




“Africa has the fastest growing population in the world and its size is expected at least to double between now and 2050. Some 40% of Africans are under the age of 15 (compared to a world average of 26%) but government spending is severely limited. No wonder that the **supply of quality higher education is being outstripped by the growth of demand for university education**” (Pfeffermann 2015:14).

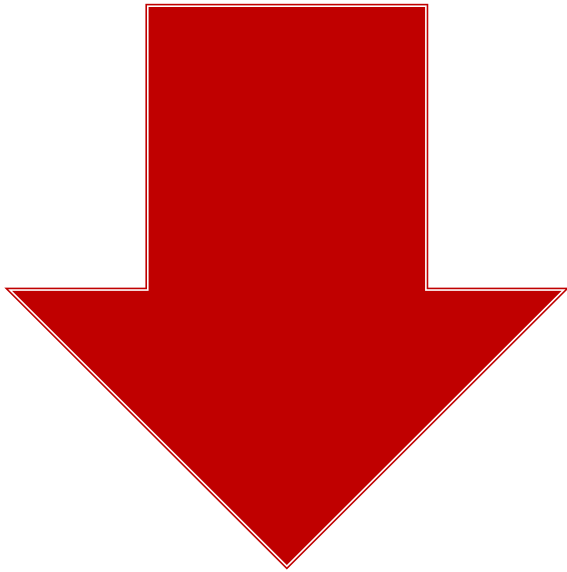
Education contexts

- **Expanding numbers** of students
- **Economically constrained** environments
- **Changing technologies, lack of infrastructure, expensive connectivity, limited bandwidth**
- **Changing and contested** conceptions of valuable **knowledge**
- **Outdated textbooks** or not entirely relevant



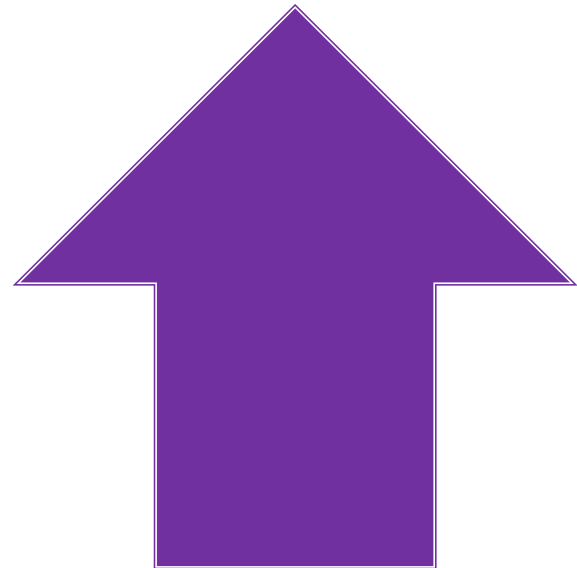
Pressures on education institutions

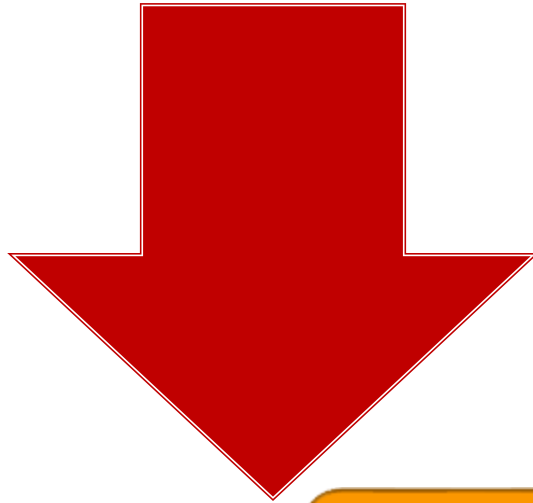
- High **quality** education
- **Cost** effective education
- **Accessible** education



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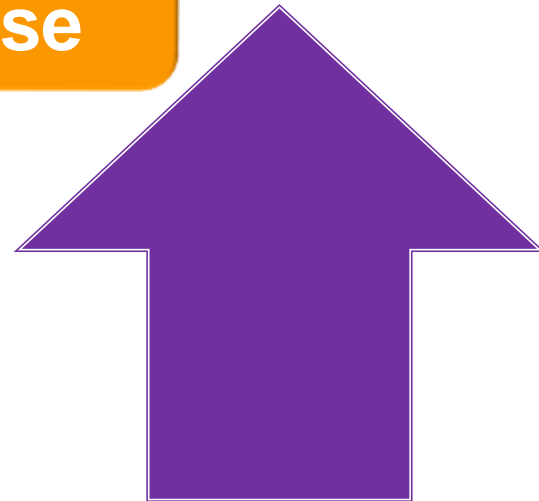
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E-Learning as a response

Education contexts

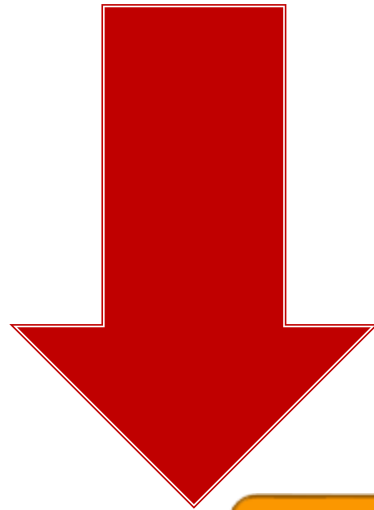
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E-Learning as a response

Affordances of the internet have enabled a range of **educational activities** to be supported digitally or conducted online to a greater or lesser degree (Arenas 2015).

e-Learning, also referred to as '**online learning**' or '**online education**', has become common-place in higher education institutions in so-called 'developed countries' and as part of commercial offerings by for-profit enterprises around the world, including 'developed countries'.



Pressures on education institutions

- High **quality** education
- **Cost** effective education
- **Accessible** education

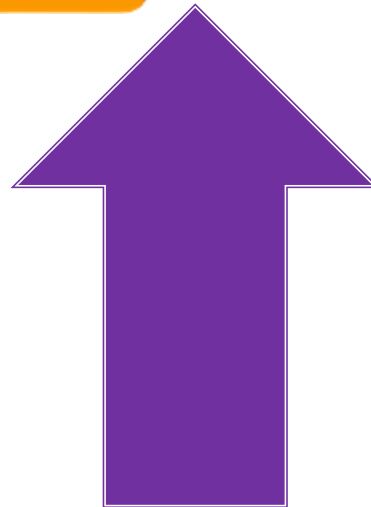
E-Learning
as a response

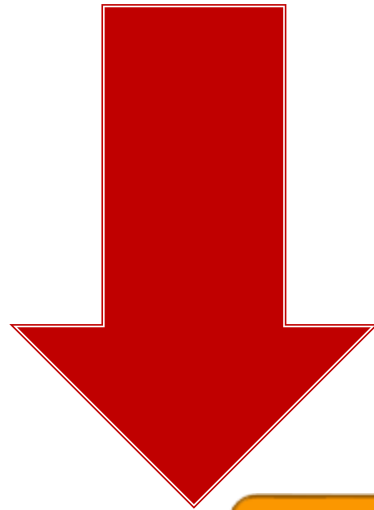
Commercial Education

- May be **high quality**
- Maybe **expensive**
- **Copyrighted materials** may be locked-down behind paywalls or need to be purchased

Education contexts

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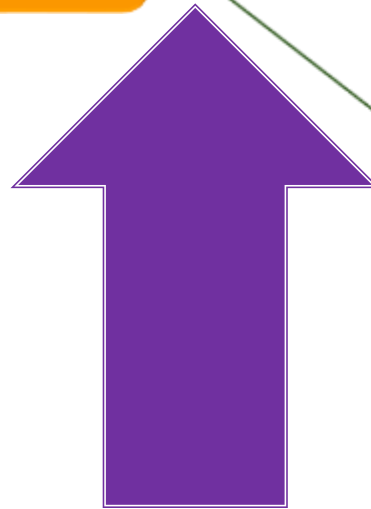
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Commercial Education

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- Maybe **expensive**
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Open Education

- May be **high quality**
- Usually **low cost** (still have to have a device & bandwidth)
- Materials are **openly licensed** to increase access and legal reuse

Open Education

Open Education, embracing fairly new forms of web-enabled activities such as:

- **Open Educational Resources (OER)**
- **Open Textbooks**
- **Massive Open Online Courses (MOOCs)**

is being hailed as a flexible and cost-effective supplement to traditional higher education provision (See Smith & Casserly 2006).

Open Education

Open Educational Resources (OER)

Open Educational Resources can be briefly defined as “**teaching, learning, and research resources** that reside in the public domain or have been released under an intellectual property license that permits their **free use and/or re-purposing** by others”

Adapted from: <http://www.hewlett.org/programs/education-program/open-educational-resources>

Examples of OER from Africa (1)

<http://www.oerafrica.org/>

<http://open.uct.ac.za/>



<http://oer.avu.org/>

Examples of OER from Africa (2)



The screenshot shows the AfriVIP website, titled "Veterinary Open Educational Resources Uniquely African Context". The navigation bar includes links for Home, About, Educational Resources, CPD, Academic programmes, Research, News and Events, Links, and Contact. A search bar is located on the right. The left sidebar contains a menu with options: Partners, Meet the Team, Contribute, Open Educational Resources (selected), license, USB, CDS, share, and Contact. The main content area is titled "Open Education Resources" and "Open Educational Resources (OER)". It explains that the Internet and digital technologies are transforming how people learn, making educational materials more adaptable and widely available. It lists three bullet points: OER are free and openly licensed educational materials; OER may freely be used, remixed, and redistributed without restriction; and OER often have a Creative Commons licence that states the conditions of use. Below this, it lists "Creative Commons licences:" with three bullet points: Help creators to retain copyright while allowing others to use their work; Ensure licensors get the credit for their work they deserve; and Serve as the baseline, on top of which licensors can choose additional conditions.

<http://www.afrivip.org/open-education-resources>



The screenshot shows the TESSA website, titled "TESSA". The navigation bar includes links for Home, News, Publications and Reports, Projects, Research themes, TESSA share, Forums, and Useful links. A search bar is located on the right. The left sidebar contains a menu with options: Partners, Meet the Team, Contribute, Open Educational Resources (selected), license, USB, CDS, share, and Contact. The main content area is titled "Open Education Resources" and "Open Educational Resources (OER)". It explains that the Internet and digital technologies are transforming how people learn, making educational materials more adaptable and widely available. It lists three bullet points: OER are free and openly licensed educational materials; OER may freely be used, remixed, and redistributed without restriction; and OER often have a Creative Commons licence that states the conditions of use. Below this, it lists "Creative Commons licences:" with three bullet points: Help creators to retain copyright while allowing others to use their work; Ensure licensors get the credit for their work they deserve; and Serve as the baseline, on top of which licensors can choose additional conditions.

<http://www.tessafrica.net>

Open Textbooks

An Open Textbook is a textbook licensed under an **open copyright license** and made available online to be **freely** used by students, teachers and members of the public. Many open textbooks are distributed in either **print, e-book, or audio** formats that may be downloaded or purchased at little or no cost

http://en.wikipedia.org/wiki/Open_textbook

Open Textbook examples from Africa



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Grade 4 - 6 Natural Sciences and Technology textbooks

Grade	4, 5, 6
Subject	Natural Sciences and Technology
First Published	2012
Distribution	6 million books
Language	English and Afrikaans
Format	Openly-licensed
Supplementary material	Teachers' guide



<http://www.siyavula.com/our-products/>

OPEN ACCESS ATLAS OF OTOLARYNGOLOGY, HEAD & NECK OPERATIVE SURGERY



SUBMANDIBULAR SALIVARY GLAND EXCISION

Johan Fagan

The submandibular salivary gland (SMG) may be excised for chronic sialadenitis, sialoectasis, sialolithiasis, benign and malignant tumours, and as part of a neck dissection. The use of sialendoscopy is likely to reduce the frequency of SMG excision for sialolithiasis.

The key concerns for the patient are the surgical scar, and injury to the marginal mandibular, lingual and hypoglossal nerves.

Surgical anatomy

The **SMG** has both an oral and cervical component. It passes around the posterior free margin of the mylohyoid muscle, which forms the "diaphragm" of the mouth and separates the cervical and oral components of the gland. The SMG is situated mainly in the submandibular triangle (Level 1b) of the neck. The oral component extends some distance along the submandibular duct immediately deep to the mucosa of the floor of the mouth (Figure 1). The duct opens close to the midline in the anterior floor of mouth.

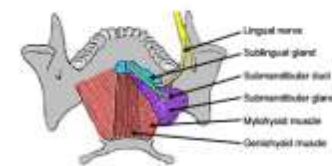


Figure 1: Superior, intraoral view of SMG.

The **digastric muscle** forms the anteroinferior and posteroinferior boundaries of the submandibular triangle (Figure 2). It is an important surgical landmark as there are no important structures lateral to the muscle. The facial artery emerges from immediately medial to the posterior belly, and the XIIth runs immediately deep to the digastric tendon.

The **mylohyoid muscle** is a flat muscle attached to the mylohyoid line on the inner aspect of the mandible, the body of the hyoid bone, and by a midline raphe to the opposite muscle (Figures 1, 2, 4, 8). It is a key structure when excising the SMG, as it forms the floor of the mouth, and separates the cervical from the oral part of the SMG. Of importance to the surgeon is that there are no important vascular or neurological structures superficial to the mylohyoid; the lingual and XIIth are both deep to the muscle.



Figure 2: Muscles encountered with SMG excision

The **marginal mandibular nerve** is at risk

<http://open.uct.ac.za/handle/11427/4154>

<https://open.uct.ac.za/handle/11427/7549>

Massive Open Online Courses

A MOOC integrates the connectivity of social networking, the **facilitation of an acknowledged expert** in a field of study, and a **collection of freely accessible online resources**. Perhaps most importantly, however, a MOOC builds on the active engagement of several hundred to several thousand 'students' who self-organise their participation according to learning goals, prior knowledge and skills, and common interests. Although it may share in some of the conventions of an ordinary course, such as a pre-defined timeline and weekly topics for consideration, a MOOC generally carries **no fees**, no prerequisites other than Internet access and interest.

(McAuley, Stewart, Siemens & Cormier 2010:4)

MOOC examples from Africa



Using ICTs to enrich teaching and learning

2015
This course closed

Facebook Twitter LinkedIn YouTube



Course Summary

What are ICTs?

ICTs (Information Communication Technologies)

Includes computers, mobile phones, digital cameras, information electronically;

ICTs includes both the hardware (the equipment) and

'Using ICTs to enrich teaching and learning' will guide teaching and learning (module 3 and 4). Based on your learning activities designed to help you extend, apply



Medicine and the Arts: Humanising Healthcare

Explore the field of medical humanities - the intersection of the arts, humanities and healthcare - with this free online course.

WATCH THE TRAILER



FREE online course

Duration: 6 weeks

3 hours per

Certificates available



<https://moocs.avu.org/learn/using-icts-to-enrich-teaching-and-learning-2015>

End Date: Apr 19 2015

Duration: 7 weeks

Course Author(s)
COL and AVU as joint copyright holder license the module hereby presented under a Creative Commons-Attribution Share Alike (CC-BY-SA) licence agreement.



What is a Mind?

Explore the most pertinent scientific and philosophical concepts for understanding our own minds with this free online course

WATCH THE TRAILER



Download video: standard or HD

FREE online course

Duration: 6 weeks

3 hours per

Certificates available

SHARE



<https://www.futurelearn.com/courses/what-is-a-mind/>

<https://www.futurelearn.com/courses/medicine-and-the-arts/>

Open Education

```
graph LR; OE[Open Education] --- OER[Open Educational Resources (OER)]; OE --- OT[Open Textbooks]; OE --- MOOC[Massive Open Online Courses]; OER & OT --- A[Affordable and current teaching materials]; MOOC --- B[Expert and cost-effective teaching]
```

Open Educational Resources (OER)

Open Textbooks

Massive Open Online Courses

Affordable
and current
teaching
materials

Expert
and cost-
effective
teaching

Materials on the internet vs OER



Internet

- Visibility of all types of materials for others to access freely that are **copyrighted by default**

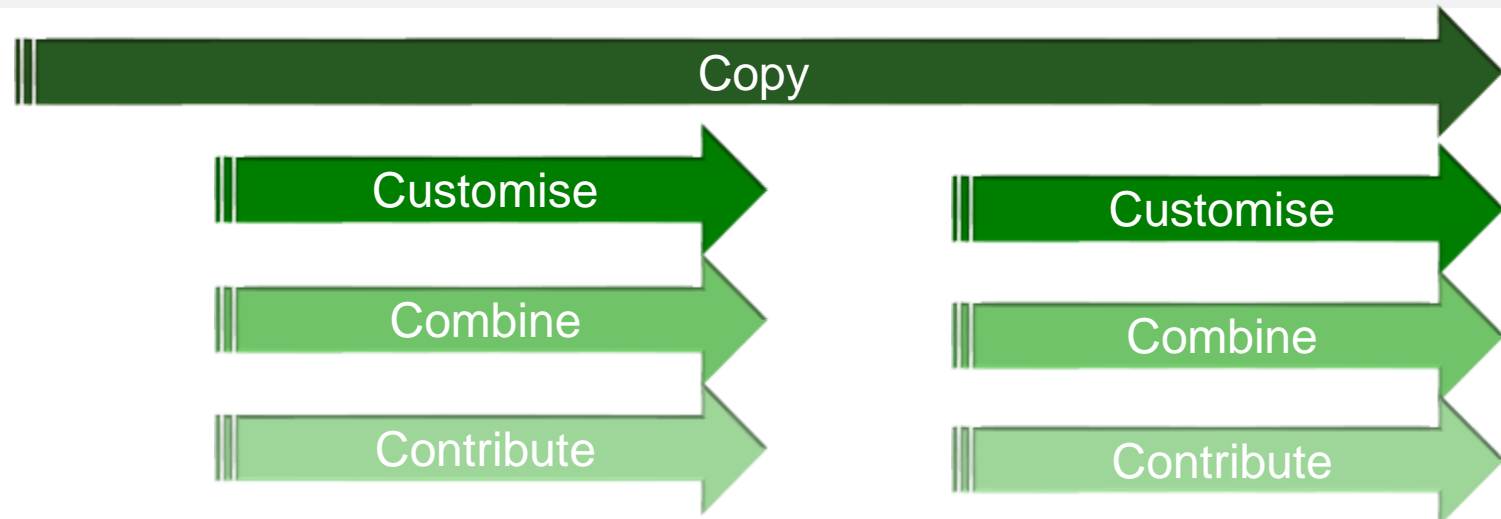









Open Educational Resources

- Intentional contribution of teaching, learning and research materials for others to access freely and **reuse legally**



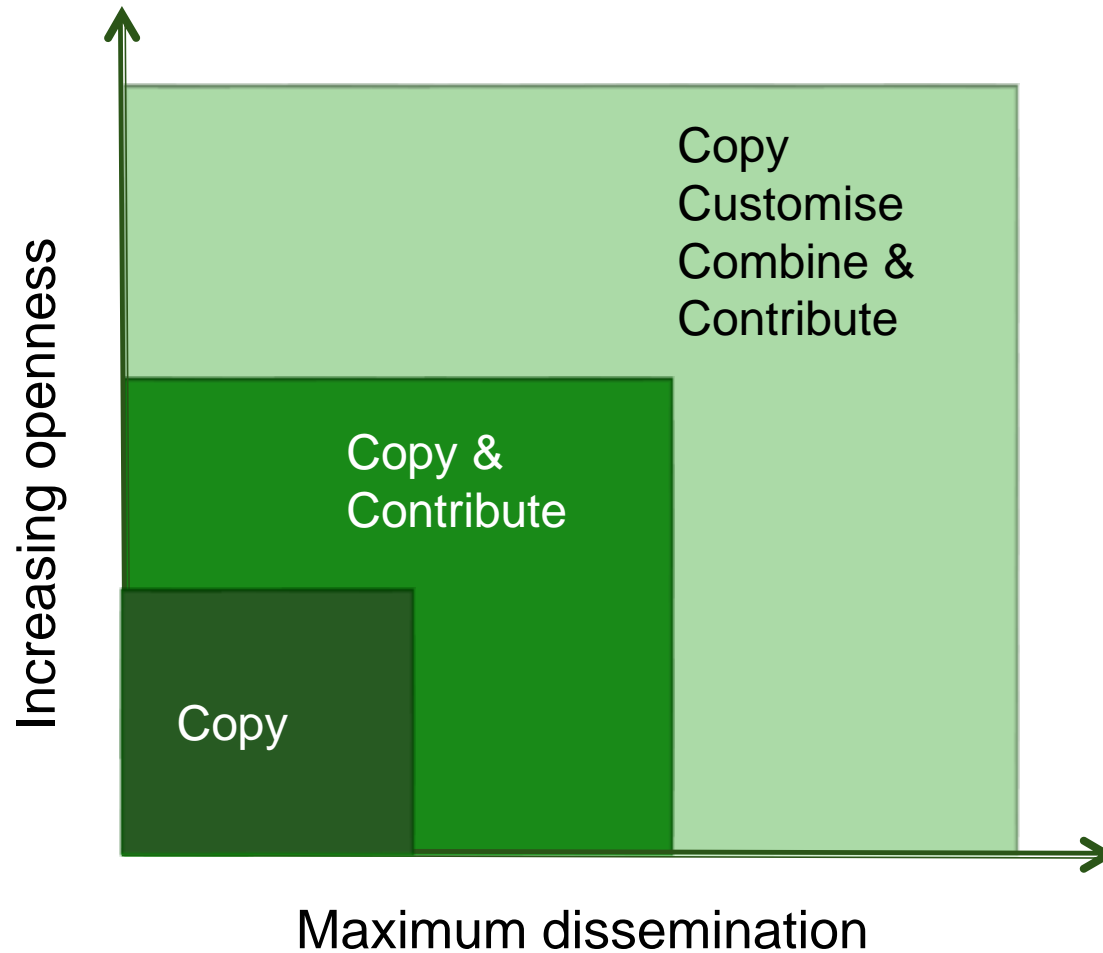
OER: Degrees of openness



Copyright	Creative Commons Licences						Public domain
All rights reserved	Attribution Non-commercial No derivatives	Attribution Non-commercial Share Alike	Attribution Non-commercial	Attribution No Derivatives	Attribution Share Alike	Attribution	No rights reserved
							
Suitable file formats	PDF, password protected document file					Wiki, xml, ODF, html	
							
Most restrictive				Most accommodating			
BY = Attribution		NC = Non-commercial		ND = No derivatives		SA = Share Alike	

Adapted from Hodgkinson-Williams & Gray (2009:110) & Hodgkinson-Williams (2014)

OER: Degrees of openness



(Adapted from Burgos & Ramírez 2011:6)

Types of Open Education practices

Open practices	Description
Finding	Locate OER, Open Textbooks and/or open MOOCs on various platforms, aggregators or search engines
Copying (Reuse)	Copy the original, use “as is” or use verbatim
Creating	Produce or develop digital teaching / learning resources that are intended to be shared openly under some type of license that allows reuse
Customising (Revise)	Edit or modify OER so that they better meet user’s needs
Combining (Remix)	Combine OER with other OER and/or ‘open materials’ (e.g. photographs, graphics with a CC license) to produce new OER
Keeping (Retain)	Own, keep and control (curate) copies of the content created or copied, customised and/or combined
Circulating (Redistribute)	Share or republishing the original OER or the new version with others

(Adapted from Wiley 1998; 2014; Okada et al 2012; Hodgkinson-Williams 2014)

Types of Open Education practices

Open practices	BY-NC-ND	BY-NC-SA	BY-NC	BY-ND	BY-SA	BY
Copying (Reuse)	* (must)	* (must)	* (must)	* (must)	* (must)	* (must)
Creating	*	*	*	*	*	*
Customising (Revise)		*	*		*	*
Combining (Remix)		*	*		*	*
Keeping (Retain)	*	*	*	*	*	*
Circulating (Redistribute)	*	* (must)	*	*	* (must)	*

(Adapted from Wiley 1998; 2014; Okada et al 2012; Hodgkinson-Williams 2014)

What do we know about Open Education practices on Africa?



[https://commons.wikimedia.org/wiki/File:
Blank_Map-Africa.svg](https://commons.wikimedia.org/wiki/File:Blank_Map-Africa.svg)

Few OER policies in Africa

OER Impact Map uses cookies to ensure that we give you the best experience of our website. If you continue to use this site we will assume that you consent to this.

OK!

This map shows policies around the world which have been established in support of open education. It includes open data from:

- The Creative Commons [OER Policy Registry](#)
- The Policies for OER Uptake ([POERUP](#)) wiki
- The list of OER projects published by Scholarly Publishing and Academic Resources Coalition ([SPARC](#))

Click on the node and title to see the full record including the policy.



<http://oermap.org/policy-map/>

Slow uptake of OE in Africa

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MASSACHUSETTS INSTITUTE OF TECHNOLOGY

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MIT OpenCourseWare averages 1 million visits each month; translations receive 500,000 more.
Visitors from all over the world use OpenCourseWare:



Region	Percentage
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South America	4%
Europe	17%
Africa	2%
Asia	9%
Australia	20%

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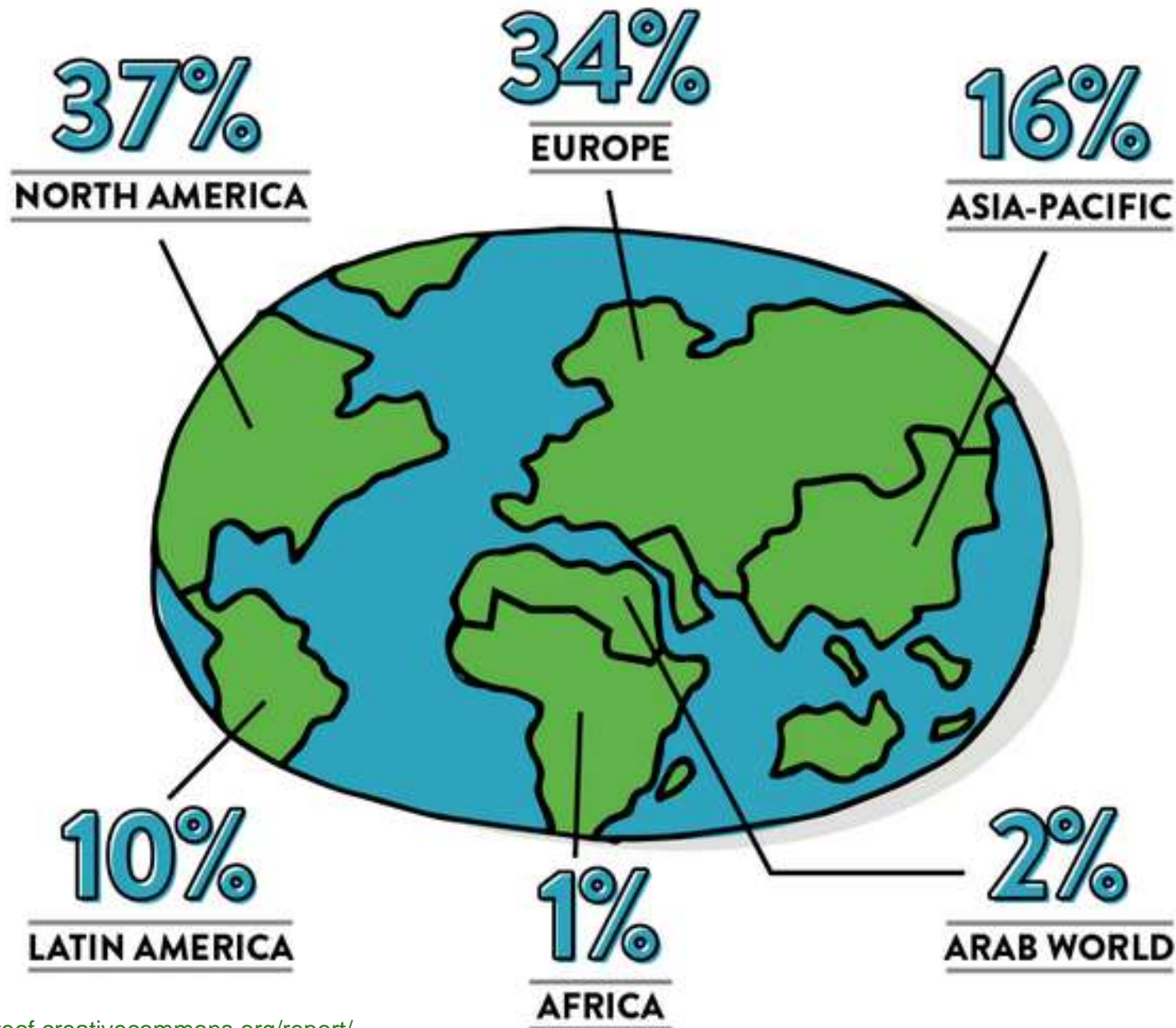
"I'm teaching myself with OCW. I may never get a degree, but I'll never be denied access to these resources."

- Moses, Independent Learner, Canada

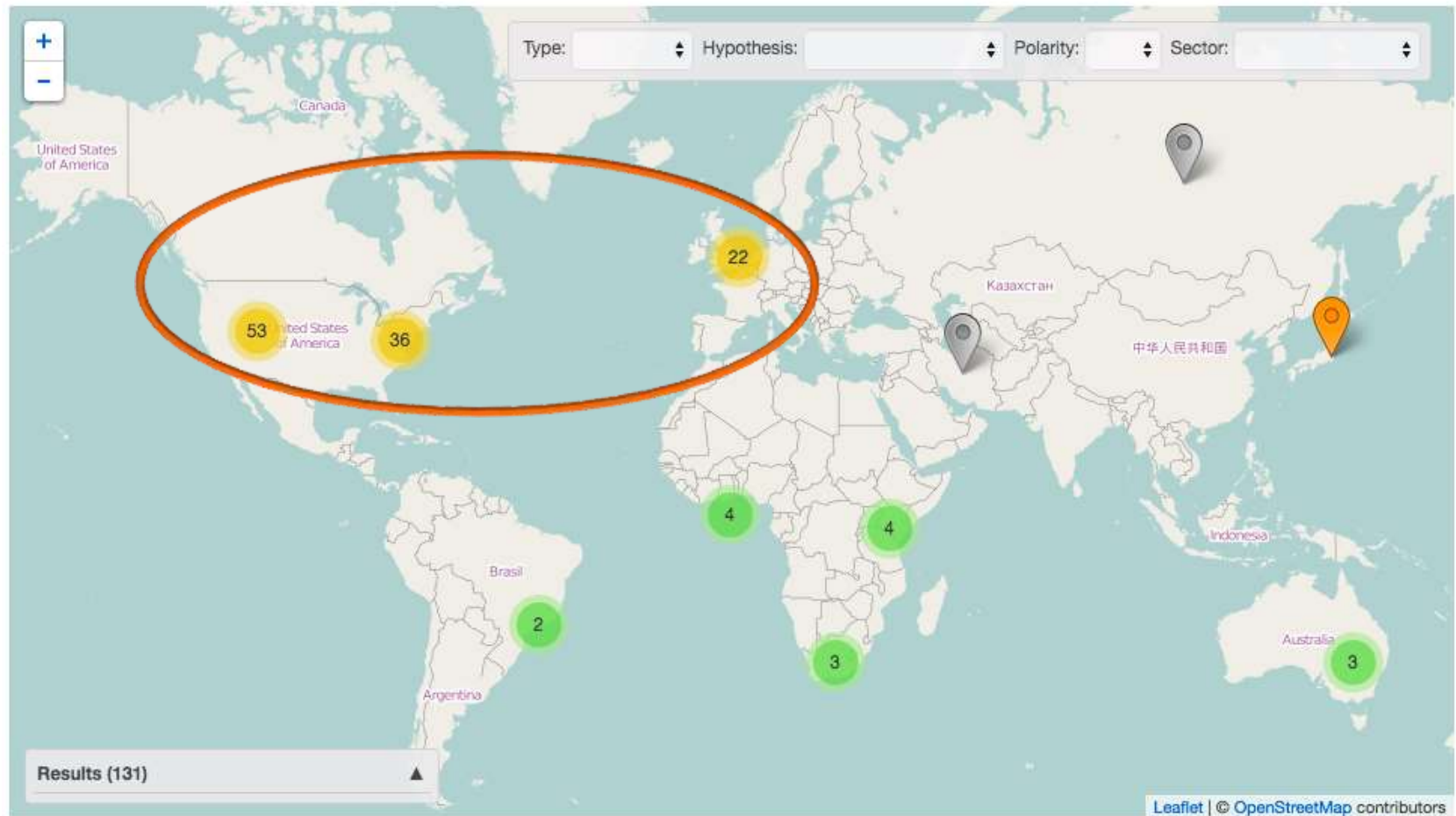
[READ MORE](#)

<http://ocw.mit.edu/about/site-statistics/>

Where CC-licensed works are published



Most OER research taking place in Global North



<http://oermap.org/oer-evidence-map/>

ROER4D Research: OER Adoption & Impact

Research on Open Educational Resources for Development in the Global South

GENERAL OBJECTIVE:

IMPROVE EDUCATIONAL POLICY, PRACTICE and RESEARCH in developing countries by better understanding the use and impact of OER

August 2013 - February 2017

PROJECT CLUSTERS

OER
Desktop Review

OER Survey

Academics'
adoption of OER

Teacher educators'
adoption of OER

OER
adoption in one
country

OER impact
studies

Baseline
educational
expenditure



roer4d.org

[facebook.com/
ResearchOERforDevelopment](https://facebook.com/ResearchOERforDevelopment)
twitter.com/roer4d



ROER4D

Research on Open Educational Resources for Development
/ jothi de / ROER-for-DE



Centre de recherches pour le
développement à l'échelle nationale



ROER4D Funding

IDRC

OSF

DFID

International Development Research
Centre (IDRC)
Open Society Foundations (OSF)
UK Department for International
Development (DFID)

3 year project (27 Aug 2013 - 27 Aug 2016 with an extension to Feb 2017)

Grant 1 - IDRC **CAD 2 million** & OSF
Grant 2 - DFID **CAD 500,000**

3 Regions

- South America
- Sub-Saharan Africa
- Central, South & South-East Asia

18 research projects in 7 clusters

86 researchers & associates

26 countries

16 time zones



In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

A world map with a light gray background. A semi-transparent green shape highlights the regions of South America, Africa, and Asia, which are collectively labeled as the 'Global South'. The text 'Global South' is written in a bold, green, sans-serif font, slanted upwards from left to right, and is positioned over the highlighted green area.

Global South

Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

ADOPTION STUDIES

1. In what ways, and under what circumstances are OER being adopted in the Global South?

Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

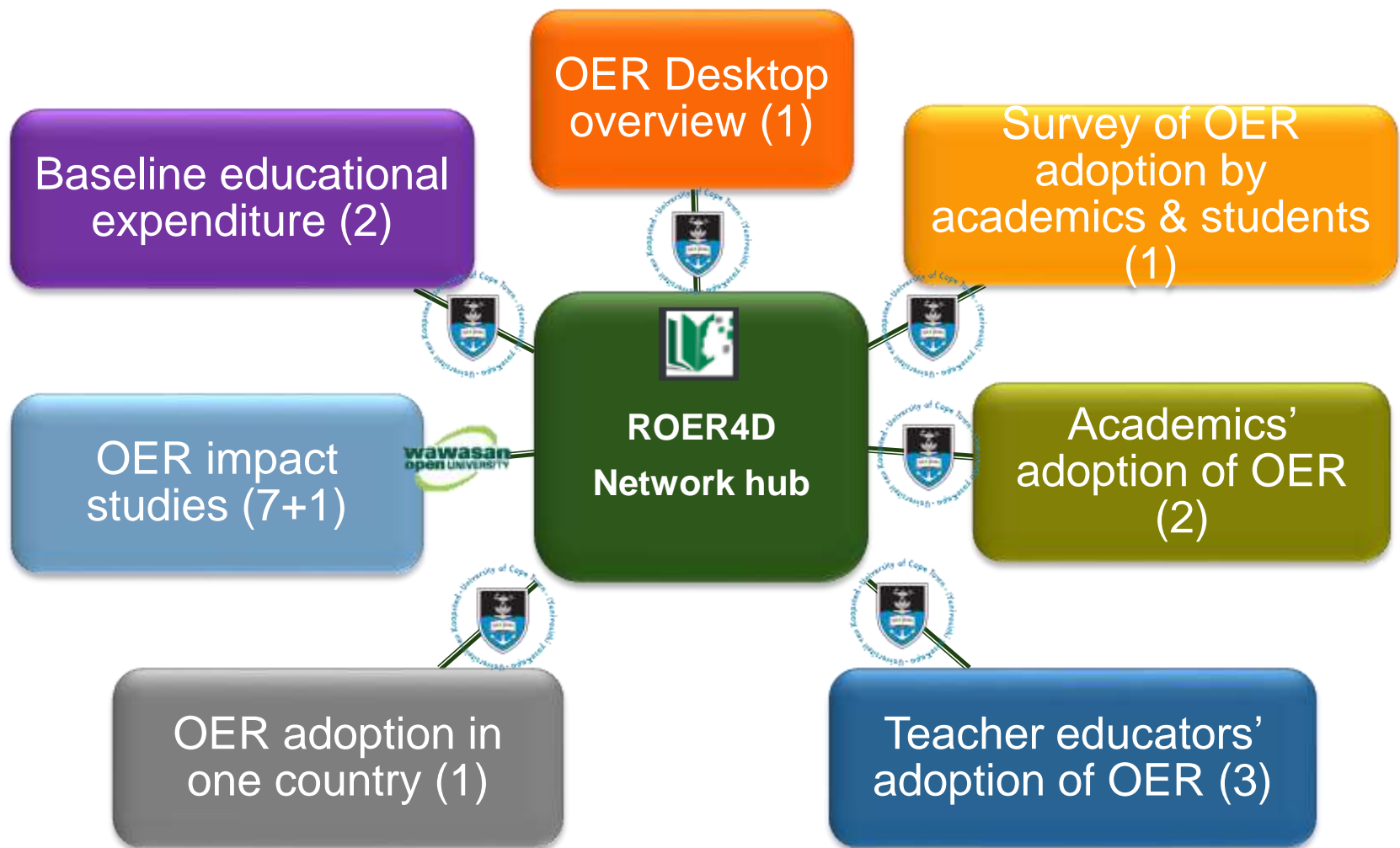
ADOPTION STUDIES

1. In what ways, and under what circumstances are OER being adopted in the Global South?

IMPACT STUDIES

2. In what ways, and under what circumstances can OER adoption impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

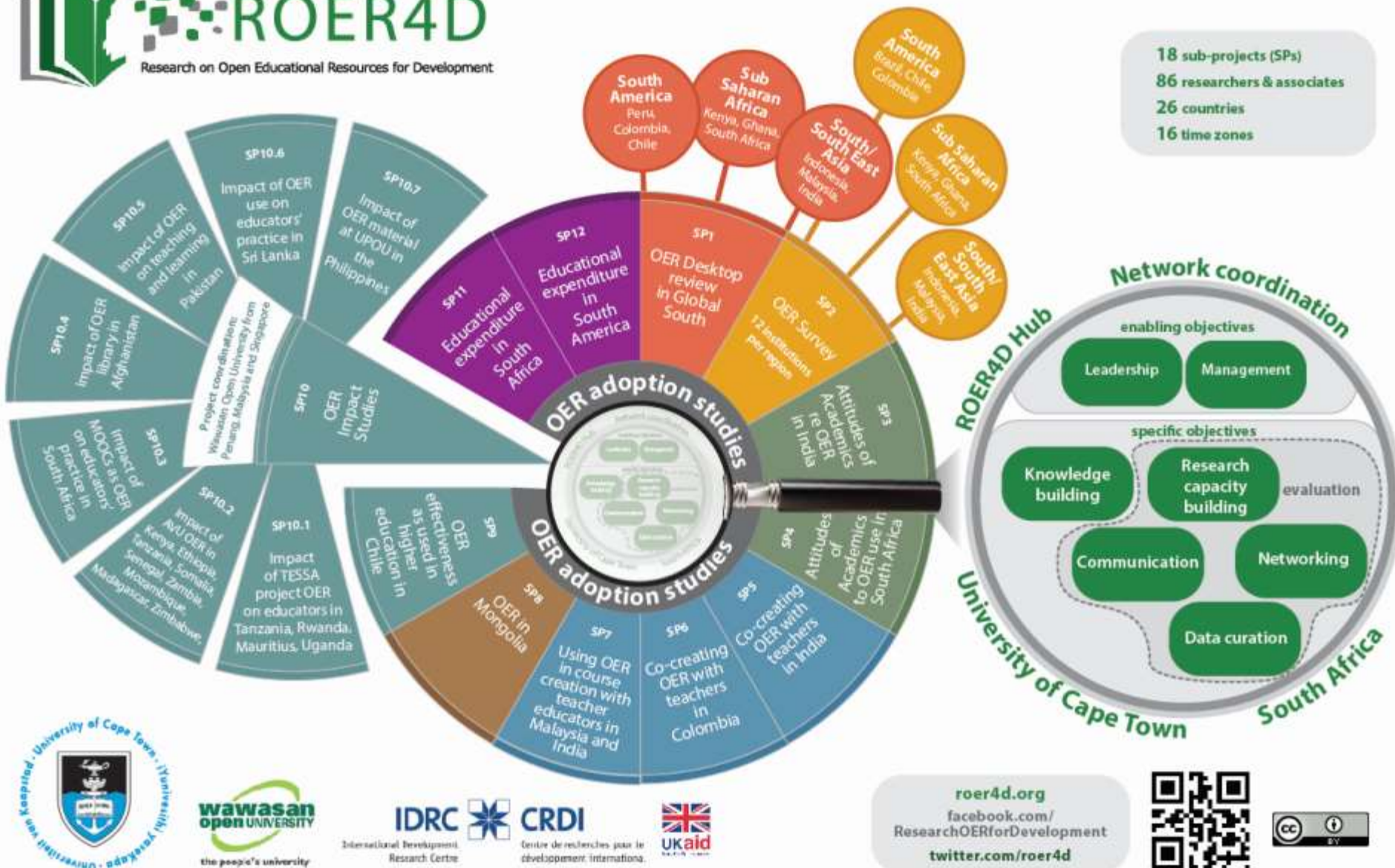
Overview of ROER4D's 7 Project Clusters



ROER4D's Project Clusters & Coordination



18 sub-projects (SPs)
86 researchers & associates
26 countries
16 time zones



ROER4D 7 projects, 14 countries in Africa

1. Ethiopia
2. Ghana
3. Kenya
4. Madagascar
5. Mauritius
6. Mozambique
7. Rwanda
8. Senegal
9. Somalia
10. South Africa
11. Tanzania
12. Uganda
13. Zambia
14. Zimbabwe



ROER4D Research sites and participants in Africa

SP1

- Desktop Review – Ghana, Kenya, South Africa

SP2

- Cross regional survey – 12 institutions in Ghana, Kenya, South Africa

SP4

- Case study or academics' adoption of OER – South Africa

SP10.1

- Impact study of educators' practices in TESSA project

SP10.2

- Impact of AVU OER in Kenya, Ethiopia, Tanzania, Somalia, Senegal, Zambia, Mozambique, Madagascar, Zimbabwe

SP10.3

- Impact study on MOOC development on academics' pedagogical practices – South Africa

SP11

- Baseline study of government spending on educational resources – South Africa

Teasing out relationships between ...

Who ... is adopting (or not)	In what ways ...	Under what circumstances ...
Teachers/ educators/ tutors/ lecturers / academics with varying: Age Gender Qualifications Experience Type of education Personal knowledge & skills Personal motivation	Adopting OER by: Locating Creating Reusing Revising Remixing Retaining Redistributing	Relevance of content Policy influence Infrastructural issues Institutional support Facility provisioning Legal issues Quality assurance issues Socio-cultural norms

Initial trends from ROER4D research:

1. Concept of OER

- In a pilot survey undertaken by one of the ROER4D sub-projects (SP2) under the leadership of Prof Dutra Oliveira from the University of Sao Paulo and Judith Pete in, it was found that **the term 'OER' was not well enough understood to be able to ask a direct question about OER** such as: “When did you first hear about OER”? Consequently the final survey instead posed questions about OER indirectly by focusing on open practices that could be interpreted as engaging in the adoption of OER.
- The survey covers 36 institutions, 12 of which are in 3 countries in Africa (Ghana, Kenya & South Africa. The research is still in progress, but so far we have about 2760 responses from students and 130 responses from lecturers in these African institutions.



Initial trends from ROER4D research:

1. Concept of OER (2)

- Interview questions posed by other projects (SP4 – South Africa) were easier to interpret as the **interviewer could clarify the questions** posed to the interviewee and **probe responses to establish actual open practices**.
- Our lesson here is that we **need to be cautious about making claims about OER adoption unless we are certain that the respondents actually understand the concept underpinning of OER** rather than just the term.



Initial trends from ROER4D research:

2. Lack of copyright and alternative licensing

- Initial trends evident from the ROER4D pilot studies in the three regions, South America, Sub-Saharan Africa and Asia point to educators and students **lack of understanding of copyright and alternative licensing, unwitting infringement of copyright or disregard for copyright**. These findings seem to be consistent with a recent study undertaken on “Access to Learning Resources” undertaken by Czerniewicz and Brown (Czerniewicz 2015) with students in higher education institutions in South Africa illustrating quite **high levels of illegal use of learning materials**.



Initial trends from ROER4D research:

2. Lack of copyright and alternative licensing

- ROER4D will have to:
 - uncover is why this is so and if and how the use of open licenses could better support educators' teaching and students' learning practices
 - pay special attention to finding out how educators and students are dealing with educational content that may be 'locked-down' behind paywalls
 - explore what materials African educators (and students) may be developing themselves and if they are indicating the re-use permissions on these materials in line with their intentions



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

- ROER4D is grappling with a way to perhaps explain the difficulty educators and students might be having with the range of OER practices by surfacing possible structural issues (i.e. the compatibility of legal regimes in developing contexts) that might inhibit open practices
- The lack of knowledge about open licensing may mean that many educators and students are assuming that everything on the internet is 'open' for reuse. By implication this means that they may not know how to best search for OER, Open Textbooks and/or open MOOCs thereby not undertaking the first open education practice - that of finding or locating open materials



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Locating (Finding)	Although there are OER aggregators and ways of searching for CC-licensed materials on search engines, finding OER can prove difficult to find if licenses are not understood	Difficult if licenses are not understood	Easy to find MOOCs in general, but not so easy to identify “open MOOCs”



IDRC



CRDI



ROER4D
Research on Open Educational Resources for Development



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Copying (Reuse)	Easy to copy as this is a common practice. Unless licences are understood and applied, infringement of copyright is possible	Easy as this is a common practice	Difficult as many MOOCs prohibit copying unless they are “open MOOCs”



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Creating	Easy to create	Relatively easy to create on Open Textbook platforms	Depending on the intended audience, this is more tricky to do individually



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Customise (Revise)	Relatively easy to revise if the re-user has suitable software & skills. Unless licences are understood and applied, infringement of copyright is possible	Difficult unless the user is using a platform that supports revision	Very difficult unless the user is using a platform that supports revision



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Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Combine (Remix)	Quite difficult especially with certain media, e.g. video. Unless licences are understood and applied, infringement of copyright is likely	Very difficult unless the user is using a platform that supports revision	Very difficult unless the user is using a platform that supports remixing and materials all have open licences



Initial trends from ROER4D research:

3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Keep (Retain)	Easy as saving is a common practice. Unless licences are understood and applied, infringement of copyright is likely	Easy to keep a copy of the original	Relatively easy to download and keep copies of the videos and text materials




Initial trends from ROER4D research:


3. Levels of ease and difficulty of open practices

Practice	OER	Open Textbooks	MOOCs
Circulate (Redistribute)	Difficult to undertake legally unless users have a public space to share openly	Easy to share a copy of the original	At this stage this does not seem possible for a re-user unless they work directly with the hosts of the platform



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- Survey on OER use
- Academics' views on sharing OER in India
- Academics' views on sharing OER in South Africa
- Co-creation of OER by teachers and teacher educators in India
- Co-creation of OER by teachers and teacher educators in Colombia
- OER integration for course development in India and Malaysia
- OER adoption and use in Higher Education in Mongolia
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Make open ...
... if it adds value
... if it is ethical
... if it is legal
... by default

Thank you!

Questions?
Comments?

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ROER4D Network Team

Funding Partners

Dr Matthew Smith

IDRC

Ed Barney

UK Aid – DFID

Melissa Hagemann

OSF

UCT Support

Prof Danie Visser

Deputy Vice- Chancellor

Project signatory for UCT

Keval Harie

Contracts Lawyer

Prof Laura Czerniewicz

CILT Director

Shirley Rix & David Worth

Finance administrators

Communication & Evaluation

Sukaina Walji

Sarah Goodier

Network Project Team

Prof Cheryl Hodgkinson-

Williams

Principal Investigator

Prof Patricia Arinto

Deputy Principal Investigator

Tess Cartmill

Full-time Project Manager

Henry Trotter

Part-time Researcher

Thomas King

Part-time Research Administrator

Rondine Carstens

Contract Graphic Artist

Tinashe Makwande

Contract Videographer

OER Impact Project Team

Prof Raj Dhanarajan & Maria Ng

Principal Investigators – OER Impact

Suan Choo Khoo & Vivien Chiam

Administrative Officers

Advisory Group

Prof Raj Dhanarajan

Former VC & Emeritus Professor

Prof Fred Mulder

Former VC & Emeritus Professor

Carolina Rossini

IP Contracts lawyer

Dr Savithri Singh

College Principal

Prof Stavros Xanthopoulos

Director FGV

Mentors

Ineke Buskens

Qualitative Research Consultant

Dr David Porter

Researcher

Dr George Sciadas

Statistician



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ROER4D Network (86 researchers & associates)

Sub-Project 1 (7)

Mariana Eguren, Peru

Maryla Bialobrzeska, **Jenny Louw**,
Ephraim Mlangi, Catherine Ngugi &
Rosemary Juma, SAIDE, South Africa

Prof Raj Dhanarajan

Wawasan Open University

Sub-Project 2 (41)

Prof Jose Dutra

University of Sao Paulo

2 part-time research assistants & 36
local coordinators

Judith Pete College, Kenya

Prof Daryono Universitas Terbuka,
Indonesia

Sub-Project 3 (2)

Prof Sanjaya Mishra

Dr Ramesh Sharma CEMCA, India

Sub-Project 4 (2)

Glenda Cox

Henry Trotter, UCT, South Africa

Sub-Project 5 (2)

Guru Kasinathan

Ranjani Ranganathan
IT for Change, Bangalore, India

Sub-Project 6 (3)

Pilar Saenz

Dr Ulises Hernandez
Marcela Hernandez, Karisma
Foundation, Colombia

Sub-Project 7 (3)

Prof Mohan Menon, B. Phalachandra
& Jasmine Emmanuel
Wawasan Open University

Sub-Project 8 (1)

Batbold Zagdragchaa

New Policy Unit, Ulanbataar, Mongolia

Sub-Project 9 (3)

Werner Westermann, Juan Muggli,
Victor Barragan
Chile

Sub-Project 10.1 (3)

Freda Wolfenden

Alison Buckler & Pritee Auckloo
Open University, UK

Sub-Project 10.2 (5)

Atieno Adala, Therrezinha Fernandes,
Marilena Cabral, Tom Ojwang, Sophia
Alexandre
AVU, Kenya

Sub-Project 10.3 (7)

Laura Czerniewicz, Sukaina Walji,
Michael Glover, Cheryl Brown, Janet
Small, Andrew Deacon, Mary-Ann Fife,
University of Cape Town

Sub-Project 10.4 (2)

Lauryn Oates, Rahim Parwani
CW4AW, Afghanistan

Sub-Project 10.5 (3)

Yasira Waqar, Saba Khalil, Sana
Shams

Sub-Project 10.6 (2)

Shironica Karunanayaka, Som Naidu,
Open University of Sri Lanka

Sub-Project 10.7 (4)

Sheila Bonito, Charisse Reyes, Rita
Ramos, Joane Serrano
Open University of the Philippines

Sub-Project 11 (1)

Sarah Goodier

UCT, South Africa

Sub-Project 12 (2)

Carolina Botero & Amalia Toledo
Karisma Foundation, Colombia



Links



Website: www.roer4d.org



Contact Principal Investigator:
cheryl.hodgkinson-williams@uct.ac.za



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Acknowledgments & Attribution

**Written by Cheryl Hodgkinson-Williams
with contributions from Henry Trotter, Tess
Cartmill, Sukaina Walji, Sarah Goodier &
Thomas King**

Contact:

cheryl.hodgkinson-williams@uct.ac.za

**Graphics by Rondine Carstens
rondine.carstens@uct.ac.za, Cheryl
Hodgkinson-Williams & Henry Trotter
henry.trotter@uct.ac.za**

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